

# IDAHO TRAVEL COUNCIL **MARKETING PLAN** 08-09



# 2008-2009 MARKETING PLAN

The travel and tourism industry is Idaho's third largest and continues to grow in size and importance. To have a healthy industry and to compete for today's tourism dollar, the State must be marketed effectively. This responsibility is managed by the Idaho Dept. of Commerce, Division of Tourism Development, with the advice and council of the Idaho Travel Council.

The marketing plan for Idaho details the overall marketing and financial objectives and identifies the program and strategies for achieving these objectives. In addition, the plan provides a discussion of key issues that impact the marketing of our state. It also addresses programs identified in the Strategic Work Plan for Tourism Development, including the Governor's Project 60, which sets forth a larger, more comprehensive plan to grow Idaho's Gross Domestic Product to \$60 billion. Project 60's planned growth is through systemic growth, domestic and international recruitment, commercialization of technology and growth in investment capital.



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## NATIONAL TRENDS IN TRAVEL:

# AN ECONOMIC ENGINE FOR AMERICA AND IDAHO



All indications point to continued growth for America's Travel industry with domestic travel increasing 7.4% since 2003. Now a \$1.6 trillion industry, the travel industry employs over 7.5 million people.

Specific segments of the industry show continuing growth since 2004:

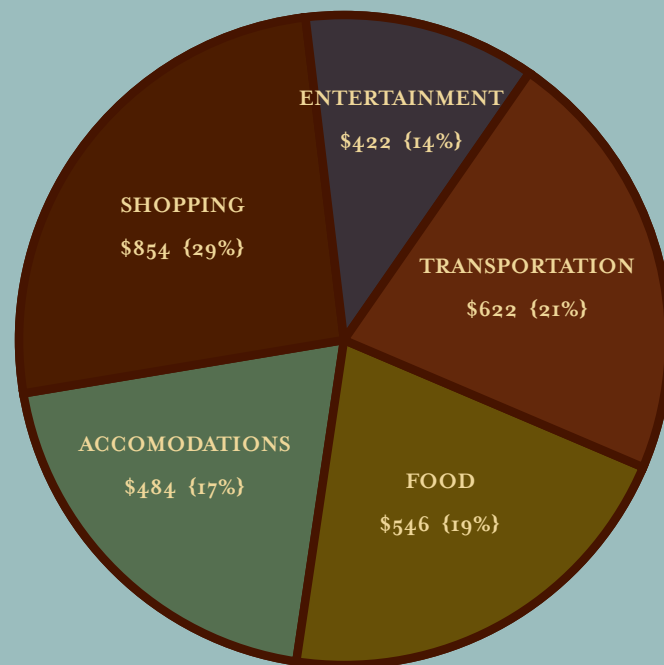
|                                    |              |
|------------------------------------|--------------|
| <b>HOTELS AND LODGING</b>          | <b>+8.1%</b> |
| <b>RV RENTALS</b>                  | <b>+22%</b>  |
| <b>AMUSEMENTS &amp; RECREATION</b> | <b>+5.1%</b> |

In Idaho, the industry is growing at a faster pace than national averages and since 2003 has grown by 22.9%. Idaho domestic traveler spending grew 6.1% for 2005 to \$3.82 billion, a new high. This exceeds the 2004 level of \$3.60 billion. In FY08, visitors to Idaho paid \$6,884,541 in room tax, which fuels the Idaho Travel Council marketing program.

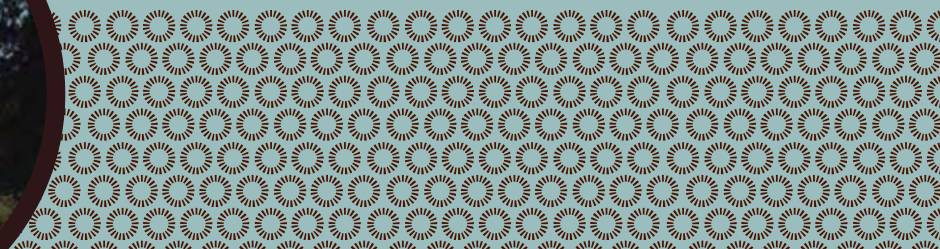


More than half of every tourist dollar is spent on food, shopping and entertainment and is spread throughout the entire state.

VISITOR SPENDING IN THE UNITED STATES {IN MILLIONS}



Source: Travel Industry of America



# TOP COUNTIES FOR VISITOR SPENDING

|            | Amount  | % of state |
|------------|---------|------------|
| ADA        | \$1,128 | 38%        |
| BANNOCK    | \$153   | 5%         |
| BLAINE     | \$154   | 5%         |
| BONNEVILLE | \$221   | 7%         |
| CANYON     | \$127   | 4%         |
| KOOTENAI   | \$288   | 10%        |
| NEZ PERCE  | \$103   | 3%         |
| TWIN FALLS | \$148   | 5%         |

\* G1 9/05

The importance of the travel and tourism industry to Idaho's employment is widespread. Many rural counties in Idaho have a high percentage of workers employed, directly or indirectly, by the travel and tourism industry. Almost half of all counties in Idaho have 10% or more of their jobs rooted in tourism.

# TOP COUNTIES FOR TOURISM JOBS

|            |     |            |     |
|------------|-----|------------|-----|
| ADA        | 13% | GEM        | 10% |
| BANNOCK    | 10% | KOOTENAI   | 13% |
| BEAR LAKE  | 22% | LEMHI      | 12% |
| BENEWAH    | 11% | LINCOLN    | 58% |
| BLAINE     | 25% | NEZ PERCE  | 11% |
| BOISE      | 21% | SHOSHONE   | 22% |
| BONNER     | 11% | TETON      | 17% |
| BONNEVILLE | 11% | TWIN FALLS | 10% |
| BOUNDARY   | 19% | VALLEY     | 36% |
| CAMAS      | 11% | WASHINGTON | 11% |
| CUSTER     | 33% |            |     |

(Source: Global Insight, September 2005)





# THE COMPETITION FOR VISITORS IS KEEN

Other states and municipalities have also seen the advantages of a strong tourism economy, so the competition to attract visitors is fierce. Idaho ranked 38th nationally in budget size and next to last among the 13 western states.

## WESTERN STATE TOURISM OFFICE BUDGETS BY RANK AND BUDGET 2007 / 2008

|                |              |
|----------------|--------------|
| 1. HAWAII      | \$85,100,000 |
| 3. CALIFORNIA  | 57,987,914   |
| 9. ARIZONA     | 24,986,829   |
| 10. COLORADO   | 22,671,508   |
| 13. UTAH       | 19,583,500   |
| 14. NEVADA     | 19,279,583   |
| 16. NEW MEXICO | 16,853,100   |
| 27. WYOMING    | 11,744,264   |
| 29. OREGON     | 11,130,000   |
| 32. MONTANA    | 10,497,336   |
| 33. ALASKA     | 10,062,578   |
| 38. IDAHO      | 7,877,375    |
| 40. WASHINGTON | 6,639,275    |

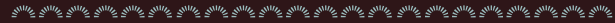
# THE TRAVEL CONSUMER CHALLENGE

Today's travel consumer has literally thousands of choices and a million ways to get information to book a trip. Each year there are about 2.6 billion trips of 50 miles or more taken in the U.S. with the great majority (58%) taken for pleasure. With an abundance of possible tourists coming to Idaho, the challenge is to be seen and heard and to "get on a family's radar when planning a pleasure trip." In today's 24/7, on-demand media world, getting the attention of audiences and stimulating them to visit Idaho is increasingly difficult.



# DEMOGRAPHICS:

THE FOUNDATION TO UNDERSTANDING OUR VISITOR



We are a mobile society and travel is so embedded into the American experience that a majority of U.S. population (58%) travels for leisure purposes at least once a year. Some people travel more than others:

1. TRAVEL INCREASES WITH INCOME.
2. TRAVEL INCREASES WITH EDUCATION.
3. PERSONS LIVING IN METROPOLITAN CENTERS AND SUBURBS ARE MORE LIKELY TO TRAVEL THAN THOSE LIVING IN SMALL TOWNS.
4. PERSONS LIVING IN THE SOUTHEAST U.S. ARE LESS LIKELY TO TRAVEL THAN THOSE LIVING ELSEWHERE IN THE U.S.

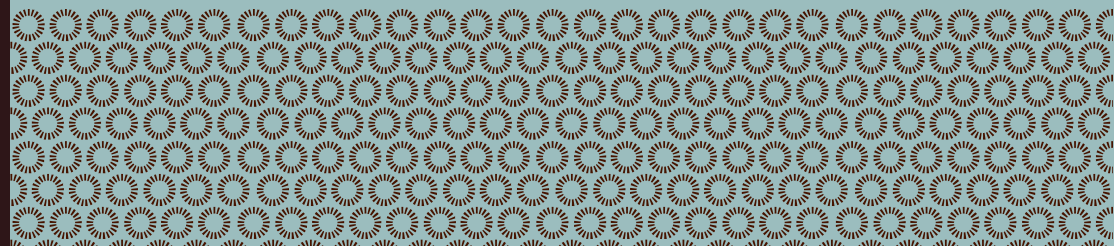


## PROFILE OF A TYPICAL AMERICAN TRAVELER



|                  |                           |
|------------------|---------------------------|
| AVERAGE AGE      | 48 YEARS                  |
| MARITAL STATUS   | 64% MARRIED               |
| EDUCATION        | 57% COLLEGE DEGREE        |
| OCCUPATION       | 44% MANAGER/PROFESSIONAL  |
| HOUSEHOLD INCOME | \$64,500 ANNUAL           |
| CHILDREN         | 36% HAVE CHILDREN IN HOME |

Source: MRI



# DEFINING THE IDAHO TRAVELER

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In 2006, the Division contracted DK Shifflet & Associates to conduct an Idaho Traveler profile study, using data gathered through their Travel Intelligence System.®

## THE METHODOLOGY:

- Monthly survey of 45,000 households in the U.S.
- 154,000 destination-stays surveyed annually
- Idaho data based on 730 trips from 2004-2005

## KEY FINDINGS:

- Market share: Overall travel to Idaho grew 3.9%, higher than the national average of 2.9%. The biggest gains were in leisure travel and day trips.
  - Party size: While data showed some slippage in Idaho's average travel party size (2.74 in 2000-2002 to 2.59 in 2003-2005), it still rates slightly higher than both the U.S. (2.43) and competitive western states (2.53).
  - Spending: Travel spending in Idaho is growing faster than in the U.S. and competitive states.
  - Motivations: Visiting friends and families, enjoying a getaway weekend or attending special events.
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# THE TYPICAL IDAHO TRAVELER IS:

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• **YOUNGER:** IDAHO ATTRACTS A LARGER SHARE OF GEN X AND MILLENNIAL TRAVELERS.

• **TRAVELING WITH CHILDREN:** AT A HIGHER RATE THAN THE U.S. AND ALL SURROUNDING STATES.

• **LOWER INCOME EARNER:** 7% LOWER THAN THE U.S. AVERAGE.

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# TARGET AUDIENCES FOR IDAHO

## BOOMERS: A GROWTH MARKET FOR IDAHO

The demographic “bull’s eye” in the travel market is the 42-60 age group, baby boomers. It is a growing market and we have an opportunity to grow our share of this important market. Travel by this group has grown to over 378 million trips annually and accounts for nearly a third of all travel. They travel more and spend more. There are over 13 million boomers residing in the eleven western states.

### BOOMERS SPEND MORE MONEY TRAVELING

|       |         |
|-------|---------|
| 18-34 | \$ 660  |
| 35-54 | \$ 950  |
| 55+   | \$1,325 |

### BOOMERS SPEND MORE TIME TRAVELING

5.3 NIGHTS 948 MILES AVG. TRIP

According to the Trendsight Group, boomers aged 50-70 represent the best marketing opportunity for the travel industry over the next 20 years. By 2016, this segment is expected to be 49% of the total U.S. population, an 11% growth since 2000. Boomers 50-70 also comprise 80% of all luxury travel, have 2.5 times more discretionary income than the average U.S. household, and have taken at least three trips in the past year.

Boomer women are increasingly becoming the primary influencer for travel planning. The six factors they consider for vacation planning are:

- Romance
- Grandparent vacations
- Empty nest=Next quest
- Girlfriend vacations
- Giving back/volunteer vacations
- Collecting experiences

## FAMILY TRAVELERS: A RELIABLE MARKET FOR IDAHO

Families love Idaho and we have a higher rate of family travel than nearby states. The presence of children traveling has been one of the most dramatic demographic changes in travel within the last 15 years. For both pleasure and business travel, children are present in 23% of all trips and has grown substantially in the last decade.

### TRIPS WITH CHILDREN (IN MILLIONS)

|                | 1995 | 2005  | Change |
|----------------|------|-------|--------|
| PLEASURE TRIPS | 74.9 | 111.7 | +57%   |
| BUSINESS TRIPS | 9.1  | 31.6  | +247%  |

-Travel Industry Association

On average, families take 2.7 leisure trips with children each year, staying an average of 6.9 nights each. More than half of the most recent family vacations were long trips of six or more nights.

Based on the 2006 DK Shifflet Idaho Travel Profile, the best family-traveler targets for Idaho are younger 18-34 year-old families or 35-54 year-old family-travelers for overnight stays and overall spending.



# NICHE AUDIENCES

Idaho's unique travel and recreation attractions provide the opportunity to concentrate on specialized markets that have a natural interest in the state. These niche audiences are made up of all ages: boomers, family travelers, Gen X and Gen Y age groups and they are seeking adventure and new experiential travel.



## IDAHO'S

### NICHE AUDIENCES

SKIING / SNOWBOARDING

RV AND CAMPING

WHITEWATER RAFTING

GUEST RANCHING

SNOWMOBILING

EXTREME ADVENTURE

GOLF

INTERNATIONAL

GROUP TOUR

CULTURAL/ HISTORIC

CULINARY TRAVEL

FISHING/HUNTING

BIKING/HIKING

SCENIC BYWAYS

MEETING/CONVENTIONS

WATCHABLE WILDLIFE

VOLUNTOURISM

GEOTOURISM

FILM

GIRLFRIEND GETAWAYS

MANCATIONS

GREEN

# TARGET MARKETS FOR IDAHO

## GEOGRAPHY

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With a limited budget for Idaho tourism marketing, success will come through market focus and proper channeling. Addressing the right demographic market within the right geography will pay better dividends than a shotgun approach to all persons in all places.

To sort it out, three key variables work to benefit Idaho:

- ACCESS
- DIFFERENTIAL ADVANTAGE
- URBAN RESPITE

Time and distance are important to the visitor when deciding on a trip. Consequently markets that have easy access to Idaho are more productive than those far away. Visitors like to see new scenery. So, markets that are located in climates or topographies that are different from those found in Idaho provide a “differential advantage” for Idaho. Finally, Idaho’s unhurried way of life is a draw to those who live and work in busy, crowded urban areas.

There is interest in Idaho from just about every state in the country. However, over 88% of all inquiries have come from persons living in the west or mid-west.

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# TOP ORIGIN STATES FOR VISITING IDAHO INQUIRES

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CALIFORNIA

WASHINGTON

ARIZONA

OREGON

COLORADO

UTAH

NEVADA

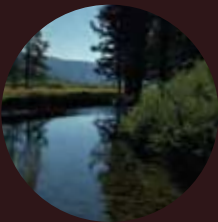
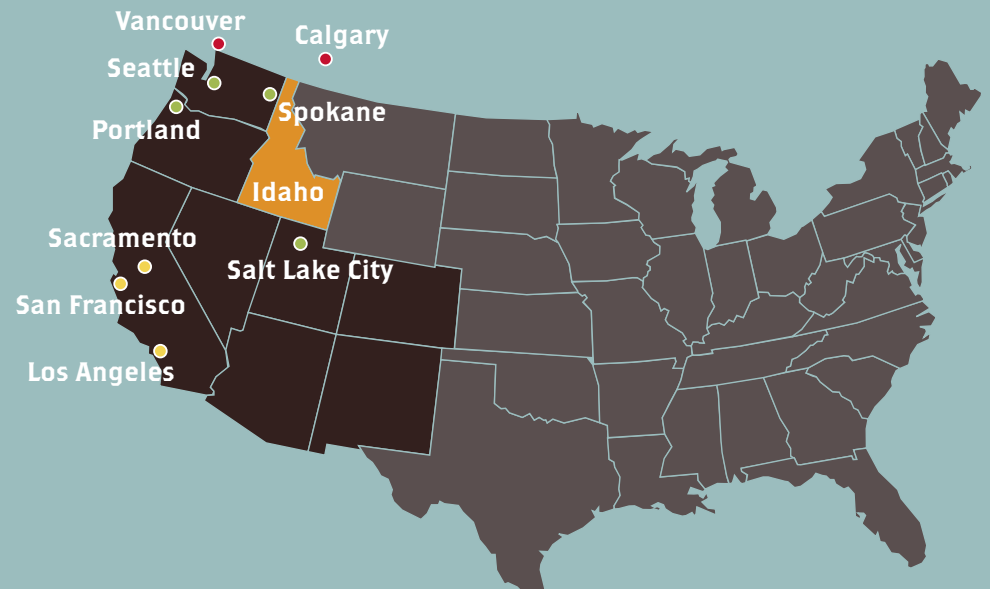
In addition, interest in Idaho is higher from:

- Middle class Western suburbs (e.g. Beaverton, Bellevue, Ogden)
  - Mid-sized Western cities (e.g. Olympia, Eugene, Reno)
  - Western communities with hot summers. (e.g. Bakersfield, Mesa, Henderson)
- ~~~~~

# TOP ORIGIN MARKETS FOR IDAHO

- 43%: SEATTLE, SPOKANE, SALT LAKE CITY & PORTLAND
- 29%: IDAHO
- 16%: SACRAMENTO, SAN FRANCISCO, LOS ANGELES
- 6%: VANCOUVER, CALGARY

— DK Shiflett, 2007



# MARKETING IDAHO A BALANCED APPROACH

Marketing Idaho falls under the responsibility of the Division of Tourism Development of the Department of Commerce with its advisory board, the Idaho Travel Council. By law, visitors pay a 2% room tax on hotels, motels and private campgrounds, thus generating the funds used to market Idaho.

Keeping what makes Idaho unique is compatible with a strong and vibrant tourism economy. The tourism industry continues its focus to enhance the visitor experience in Idaho by educating and training employees. Improving transportation and paying attention to basic community infrastructure needs will be critical to keeping the travel industry healthy. Being sensitive to environmental and cultural treasures will help sustain the uniqueness of the state we love.



## MISSION

*The mission of the Idaho Travel Council and the Division of Tourism Development is to increase travel and visitor expenditures throughout all of Idaho in order to increase tax revenues and employment. The Council and Division will achieve this goal by increasing awareness of and inquiries about Idaho's destination travel opportunities and encouraging the expansion of Idaho's travel service capability.*

Idaho's marketing program focuses on the travel to and within Idaho that requires one or more overnight stays. Growth in the program will be a result of expanding the awareness of Idaho as a destination, thereby increasing the demand for accommodations within the state. The enhanced awareness of and demand for rooms in Idaho can be measured by:

1. HIGHER OCCUPANCY RATES,
2. HIGHER HOTEL ROOM REVENUES
3. STIMULATING ADDITIONAL CAPITAL INVESTMENTS IN HOTEL & HOSPITALITY FACILITIES.

Growth in state tax revenues paid by all visitors is a significant benefit of the state's travel industry. These tax revenues constitute a very high return on investment for Idaho because they are paid by out-of-state visitors who don't require schools, social services, or other traditional governmental benefits.



# MARKETING OBJECTIVES

## GIVING FOCUS AND ACCOUNTABILITY

Clear-cut and succinct objectives keep the travel marketing program efficient, accountable, and measurable as well as producing a high return on investment.



- Increase lodging and campground tax collections from \$8,108,641 in FY08 to \$8,351,900 by June 30th, 2009.
- Increase inquiries about Idaho Travel from all sources, from 816,560 to 890,000 by June 30th, 2009.
- Increase the exposure of Idaho messages in paid media from 200,000,000 gross impressions to 250,000,000 by June 30th, 2009.
- Increase the ad equivalency exposure to Idaho messages generated from public relations, from 43,418,347 in FY08 to 44,000,000 by June 30th, 2009.
- Increase the overnight stays offered by international tour companies in key markets, including UK, Italy, France, Germany and Benelux, from 197,736 to 250,000 by June 30th, 2009.
- Increase website page views across all visitidaho.org sites from 5.5 million to 6.5 million by June 30th, 2009.
- Expand cooperative support to the state's tourism program by private sector companies and public sector entities to \$1,000,000 in 2009.
- Expand the economic impact of feature films, national commercials, television programs and movies from \$500,000 in FY08 to \$1,000,000 by June 30th, 2009.

## THE IDAHO MESSAGE:

# AN OPPORTUNITY TO DEFINE OUR STATE

Our state has a real opportunity to define itself because we start with a relatively clean slate. In 2001 Wirthlin Worldwide said "Idaho has a tremendous opportunity to define itself in positive and personally relevant terms. At present, there is no brand promise associated with Idaho." Over 42% of persons interviewed by Wirthlin had no impression of Idaho while over 66% correctly associated our state with potatoes and 30% with scenery. They concluded their report by saying "Idaho's greatest opportunities for differentiating itself from its competitive states lies in the high awareness of Idaho's famous potatoes and its pristine landscape."



Wirthlin identified other positive attributes that are ascribed to Idaho which were confirmed in the 2006 DK Shifflet study.

- AN IDAHO VACATION IS A GOOD VALUE
- IT'S A GOOD PLACE FOR FAMILIES WITH CHILDREN
- VISITORS TRAVEL A LONGER DISTANCE TO VACATION IN IDAHO
- IDAHO IS FILLED WITH BEAUTIFUL SCENERY, LAKES, RIVERS AND MOUNTAINS
- IDAHO'S UNIQUE IDENTITY IS EXPRESSED THROUGH THE DIVERSITY OF OUTDOOR RECREATION

These messages are used throughout the state's marketing plan in a consistent, unified manner across all media forms. The program uses spectacular scenery that is viewed as accessible and approachable to boomers and families and combined with copy that engages its audience in a very real way. The challenge in crafting messages about Idaho will be to get beyond the obvious.

## Adventures in Living Campaign

- RUSTIC-CONTEMPORARY
- CONNECTION TO THE EXPERIENCE AND LOCATION
- A SENSE OF FAMILIARITY WITH IDAHO
- PROVIDE DEEPER, MORE MEANINGFUL PERSONAL EXPERIENCE
- INHERENT SPIRIT OF ADVENTURE

# { MARKETING PROGRAM ELEMENTS



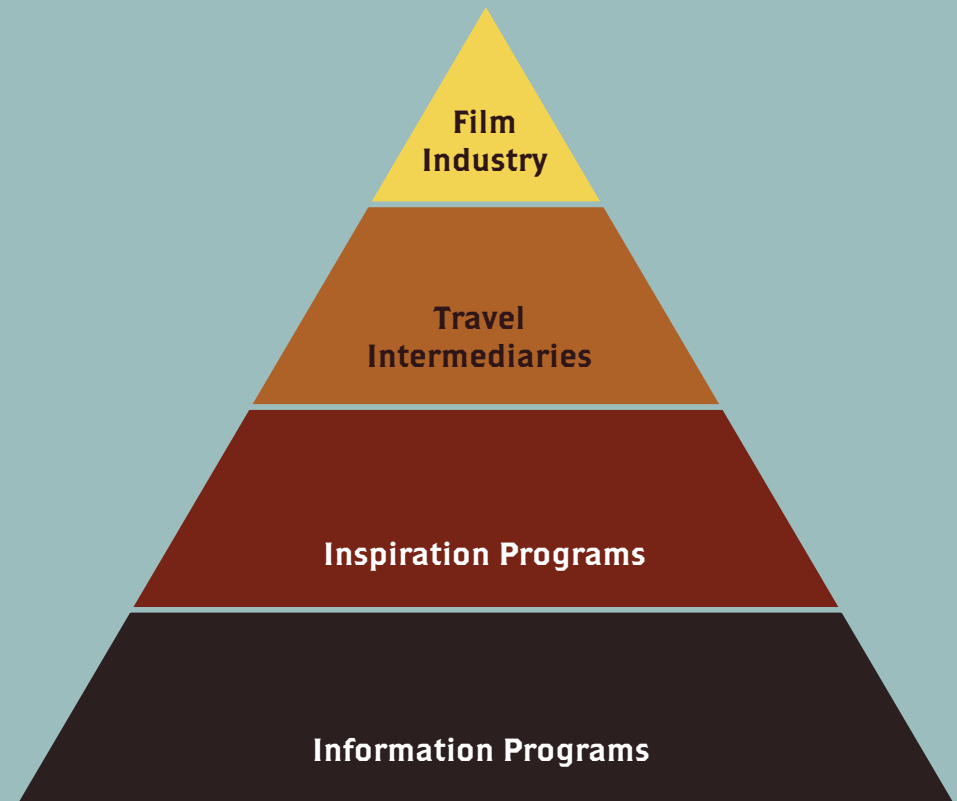
For a state of our size, Idaho's marketing program is one of the most efficient in the country, and it is regularly acknowledged for its high level of creativity. Such acknowledgement is the result of a marketing plan that is focused and effective at targeting travel prospects that have a higher likelihood of visiting.

Idaho's tourism marketing is a multi-faceted, comprehensive, year-round program. It does two things: it inspires and it informs.

The plan informs potential visitors through a number of programs: travel guides, websites, brochures and online information. Market research helps guide the entire effort, and outreach to industry segments helps extend the information reach.

But simply informing visitors is not enough to stimulate travel. Visitors must be inspired to seek our information about traveling to our beautiful state. This inspiration role falls to domestic and international efforts in advertising and public relations.

The marketing plan is topped off with programs directed to travel intermediaries because they influence large groups of travelers in their travel plans. Lastly, marketing Idaho to the film and commercial industry falls under the purview of the Division and is included in the state marketing plan.



## INFORMATION PROGRAMS

# WEBSITES & INTERACTIVE

According to the Travel Industry Association, 79 million American adults are using online resources to plan their trips, and a majority (78%) of online travelers say they consulted the internet to get travel and destination information in 2005. These numbers have increased steadily in the past three years, especially among Idaho's key audiences of Boomers and Families. Boomers in particular have risen, showing a 47% increase in online adoption from 2000 through 2005.

As a result, it is critical to maintain online resources for potential Idaho travelers. A total of thirteen different tourism sites are currently online and marketed using industry best practices including search engine and keyword optimization and social marketing. These include mass-marketed consumer sites and a variety of "mini-sites" to specialty markets and activities. Idaho's travel industry is also served with sites designed for the group-tour market, film and commercial production, and hospitality training.

All thirteen sites are served by information from three key databases of Idaho lodging, events, and attractions. This helps provide consistency across all sites when consumers search any of them. The databases themselves are continually updated via updateidaho.com, a database management tool providing 24/7 access by the Idaho Division of Tourism Development and members of Idaho's travel industry.

E-mail promotions and e-newsletters have become effective tools to communicate with consumers and the industry. Idaho Journeys, the Division's consumer e-newsletter, is distributed bi-monthly. The Idaho Film Office distributes a monthly e-newsletter catered to Idaho film industry professionals.



### [www.visitidaho.org](http://www.visitidaho.org)

The flagship website for consumers wanting to learn more about traveling to Idaho, featuring the most robust information available about Idaho attractions, accommodations, events, and more.

### [www.idahowinter.org](http://www.idahowinter.org)

The official winter recreation site, with information about skiing (alpine and Nordic), snowboarding, snowmobiling, and other winter activities.

### [www.sledtherockies.com](http://www.sledtherockies.com)

Tri-State Snowmobiling site, shared with Montana and Wyoming.

### [www.idahogolftrail.com](http://www.idahogolftrail.com)

Promotes the eight individual golf courses that comprise the trail, plus links to InIdaho.com, the lodging provider/booking engine for the program.

### [www.idahowhitewatertrail.com](http://www.idahowhitewatertrail.com)

Primary source of information to learn more about the Trail which includes a number of 1/2 and full day trips down Idaho's primary river systems.

### [www.lewisandclarkidaho.org](http://www.lewisandclarkidaho.org)

Official Lewis & Clark site for Idaho.

### [www.touridaho.org](http://www.touridaho.org)

For the group tour/motorcoach industry.

### [www.filmidaho.com](http://www.filmidaho.com)

Idaho Film Office website, promoting the benefits of shooting film work in the state.

### [www.idahost.org](http://www.idahost.org)

Hospitality training for Idaho's travel industry.

### [www.rvidaho.org](http://www.rvidaho.org)

Online version of the existing Idaho RV & Campground Directory developed with the cooperation of the Idaho RV & Campground Association.

### [www.updateidaho.com](http://www.updateidaho.com)

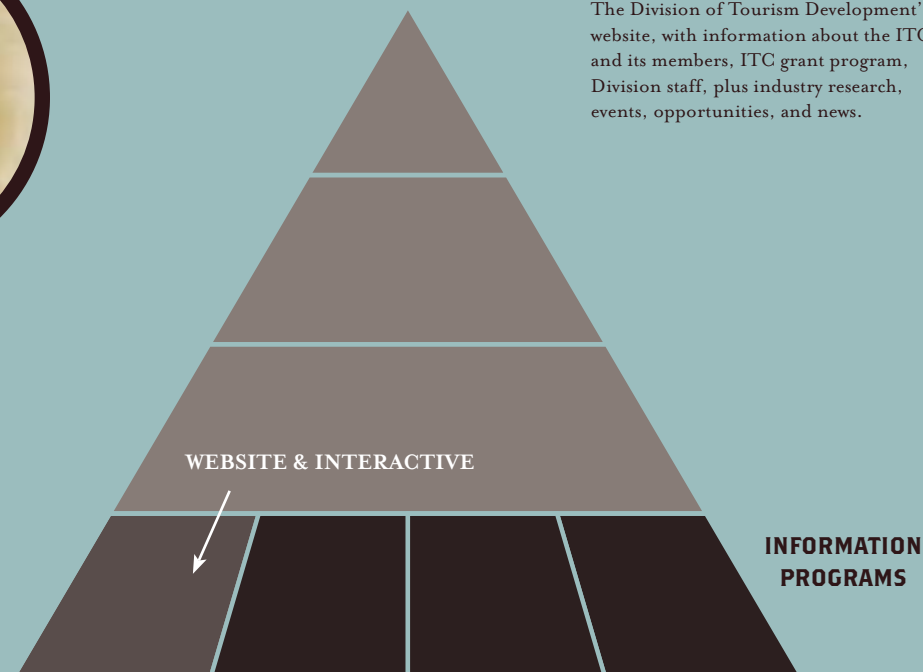
Portal for information updates for Idaho lodging, attractions and events.

### [www.idahobyways.gov](http://www.idahobyways.gov)

Official site for Idaho Scenic Byways, developed and maintained in conjunction with the Idaho Transportation Department.

### [www.tourism.idaho.gov](http://www.tourism.idaho.gov)

The Division of Tourism Development's website, with information about the ITC and its members, ITC grant program, Division staff, plus industry research, events, opportunities, and news.





## INFORMATION PROGRAMS

# TRAVEL PUBLICATIONS & INFORMATION CENTERS

Other than word-of-mouth, printed travel guides, maps, and brochures continue to serve as valuable off-line tools for travel planning. Compared to online resources, the value in travel collateral is the ability to show high resolution photography of Idaho destinations, provide stronger narrative and cater to specific audiences or activities.

The Idaho Travel Guide is the primary printed response piece for travelers to Idaho and is the definitive source for information, events, and accommodations in Idaho. It is divided into seven regional sections with city accommodations information, a comprehensive outdoor adventure section and a winter section. As demand for travel information from the state's website has ballooned in recent years, demand for the printed Travel Guide has been holding steady. Currently, 140,000 units are to be printed in 2009. In addition, the main sections of the Guide can be downloaded as .pdf files from [visitidaho.org](http://visitidaho.org).



Idaho has three Visitor Information Centers in its borders. Each center is located on the Interstate Highway system, thereby providing maximum exposure to travelers entering the state by automobile or RV.

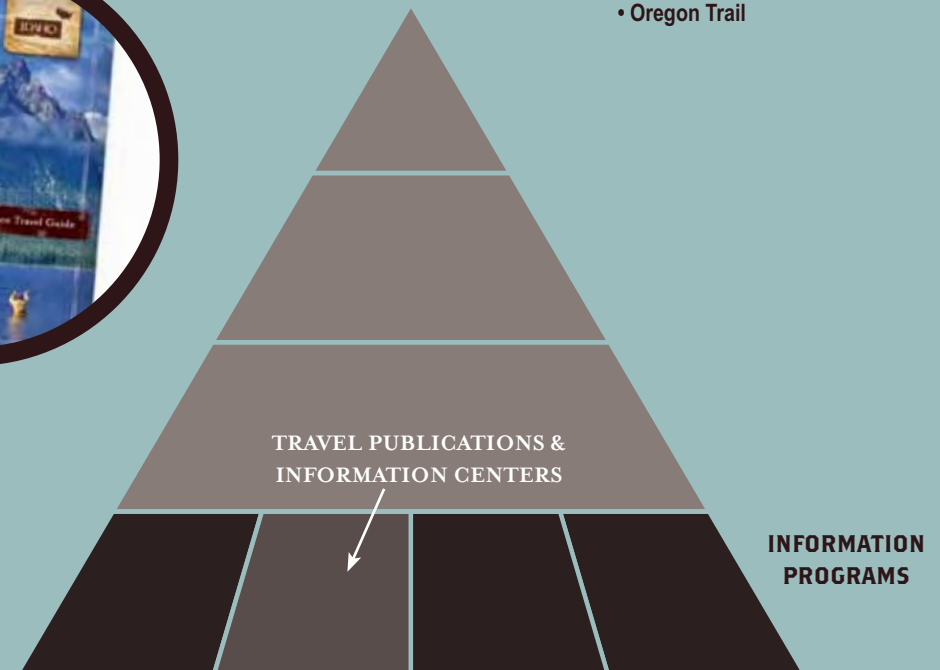
- **Huetter Visitor Center**  
(Interstate 90, North Idaho)
- **Snake River Visitor Center**  
(Interstate 84, Southwest Idaho)
- **Cherry Creek Visitor Center**  
(Interstate 15, Southeast Idaho)

The centers are volunteer-operated, and offer a wide mix of Idaho Travel Council collateral, kiosks, wayfinding signage, and phone service.

For a complete list of local visitor centers and chamber/visitor bureau locations, please visit [www.commerce.idaho.gov/travel/](http://www.commerce.idaho.gov/travel/)

Beyond the Travel Guide, these information pieces are available:

- **Children's brochure:**  
"Hello from Idaho, the 43rd State"
- **Lewis & Clark Trail in Idaho**
- **RV Directory**  
(on behalf of Idaho RV & Campground Assoc.)
- **Foreign Language Travel Guide**  
(Chinese, Japanese, Spanish)
- **Idaho Golf Trail brochure**
- **Idaho Whitewater Trail brochure**
- **Official Highway Map**  
(with Idaho Transportation Department)
- **Idaho Scenic Byways brochure**  
(with Idaho Transportation Department)
- **Idaho Film Office Publications**
- **Idaho State Parks Guide**  
(with Idaho Dept. of Parks and Recreation)
- **Museum of Idaho**
- **Oregon Trail**



## INFORMATION PROGRAMS

# PUBLIC RELATIONS & INDUSTRY OUTREACH

Public relations is a valuable component of the Idaho Travel Council information program. Articles and stories about traveling in Idaho strengthen and complement advertising programs by giving valuable third party credibility/validity to the messages being communicated through advertising. The benefit of successful public relations can result in high profile editorial in key consumer travel publications and web-sites, as well as raising the profile of Idaho tourism across the industry.

The FY09 public relations plan has been developed with a “meet in the middle” methodology, whereby customized information pieces are adapted to fit a variety of audiences. Unlike a “one size fits all” approach, this plan provides information about specific activities and interest and directs it to appropriate audiences.

- Outdoor Idaho (fishing/hunting, boating, mountain biking, hiking, etc.)
- Skiing and Winter Sports
- River Trips and Guest Ranches (including Idaho Whitewater Trail)
- Camping and RVing (including State Parks)
- Golf and Resort Activities (including Idaho Golf Trail)
- City Life
- Historical and Cultural Highlights
- Wine Tours/Culinary Tourism
- Sightseeing (geology, wildlife, Ag tours, etc)

These nine areas of focus cover content pertinent to all seven travel regions of Idaho, and allow editors and publishers to easily obtain the information about Idaho that fits their journalistic interest, without wading through unwanted material.

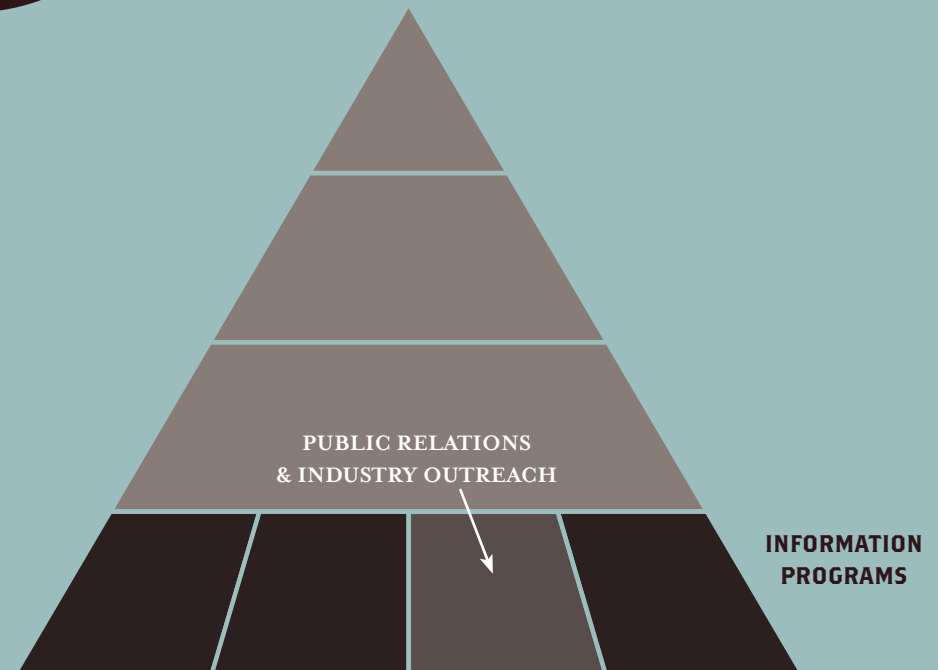


### Tactical elements of the FY09 plan:

- Development of social media programming/planning online content creation
- Clipping service & media monitors
- Pro-active story pitching, editorial calendar building & tracking
- FAM & Media Tours
- Assistance with collateral items

The Division of Tourism Development also has a strong industry outreach program. Such outreach allows a forum for industry members to share ideas, create partnerships and generally keep abreast of the ITC marketing program.

- Idaho Conference on Recreation and Tourism
- Grant Summit
- Regional Visitations and local workshops
- Idaho Travel Council meetings held throughout the state
- Tourism.idaho.gov website
- Monthly newsletters



## INFORMATION PROGRAMS

# MARKET RESEARCH

Primary and secondary research is invaluable to the travel industry because market dynamics continue to change and consumer behavior can quickly shift. For tourism, market research can be used in a variety of ways, including:

- Economic Impact Studies
- Traveler Profiles / Motor Vehicle Surveys
- Traveler Attitudes and Awareness
- Segmentation Studies
- Message Testing
- Travel Impact International

For FY09, the Division of Tourism Development has allocated \$35,000 for data analysis using the Longwoods Travel USA online research panel. The research study will reflect the 2008 data and will target travelers to Idaho from a quarterly randomized travel panel of 500,000 nationally.



## INSPIRATION PROGRAMS

# PRIME & SHOULDER SEASON

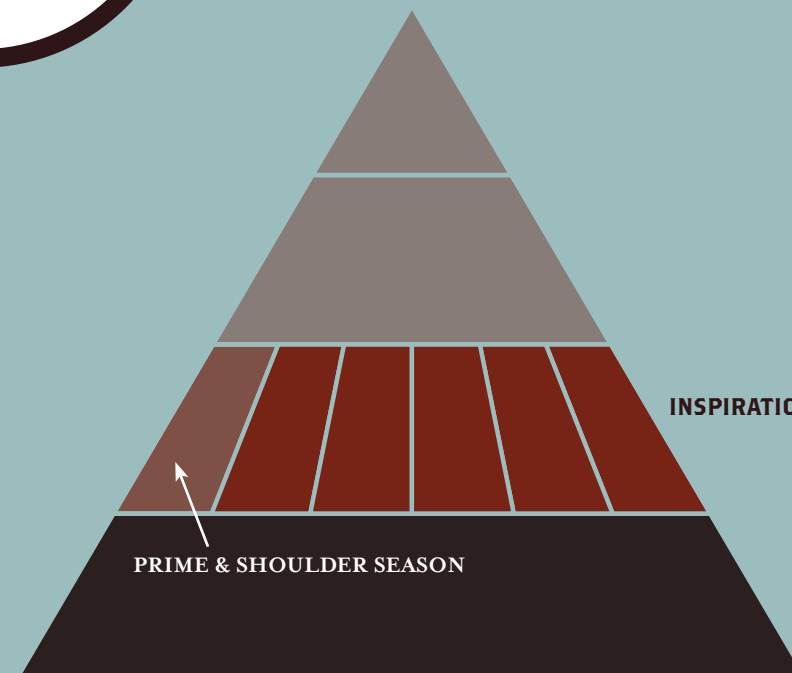
The warm weather months between April and November provide an excellent opportunity to develop Idaho's tourism business and expand its image as a sought-after travel destination. This is defined as the ITC's Prime and Shoulder seasons, and it's when most people travel and the industry is at its busiest. It's the prime season to gain market share, increase margins and introduce more visitors to the beauty and fun of an Idaho vacation.

People traveling in Idaho during these months also provide a fertile market for winter destinations since the likelihood of winter travel increases among crossover travelers who have experienced Idaho first hand. Further, the entire state and all seven travel regions benefit from travelers visiting our rural towns, back-roads and urban areas during these prime season months, accordingly the marketing program focuses much of its resources to maximizing travel to Idaho during this time.

### The strategy rests on two marketing premises:

- 1. Build an Idaho Image:** Develop a strong and impactful image of value, scenery and water amenities in all media. Show a strong Idaho name identity with the new theme: Idaho. Adventures in Living.
- 2. "Ask for the order:"** Build messages in all media that demand attention and solicit an inquiry or trip. Use website address and 1-800# in a prominent manner to encourage easy response.

The focus for Idaho's prime and shoulder season campaign is based upon targeting each of the target audiences with magazines and online media that are of interest to them. The campaign is run at a time when potential visitors are actively planning their leisure travel trips for this time.



INSPIRATION PROGRAMS

PRIME & SHOULDER SEASON



## CONSUMER PUBLICATIONS TACTICS (AWARD-WINNING MAGAZINE PROGRAM)

Magazines are a primary media vehicle for Idaho Travel promotions because they can efficiently reach the selective target audiences across a wide geography. Magazines provide the ability to match advertising with editorial compatibility and their high quality reproduction allows "showing off" Idaho and building image.

Additionally, magazines can vertically segment target audiences in the 11 Western States to effectively target boomers, families and specific niche markets. But with hundreds of options of magazines to advertise in, a number of criteria are used to narrow the list of publications. Critical factors of a magazine's audience are analyzed against one another to achieve the most efficient magazine plan. All magazines are screened using three different filters to narrow the choices to the most appropriate and effective magazines.

- 1. Demographics:** Age, gender, household income, presence of children, suburban or small city resider, and western states circulation.
- 2. Psychographics:** Propensity to travel in U.S. and by auto/RV, use of online for travel planning/booking, VFR, and participation in outdoor activities.
- 3. Performance metrics:** Historical performance of inquiries, travel editorial, 11 western states circulation, rates and CPM, and value-added components.



## ONLINE MEDIA TACTICS

The Prime Season Online Media Plan rests on two major pieces: the combination of search engines and content sites. This combo is like using display and directory ads in the Magazine Program, and each has their own strengths.

Like a travel directory ad, search engines are effective because they reach consumers who are actively in the travel planning process. By purchasing Google or Overture keywords related to Idaho travel or popular Idaho recreation activities, relevant and specific messages can be presented to consumers. Nearly 80% of the Internet audience relies on search engines to find specific information, and are a primary tool used in travel planning.

Content sites are similar to large, display magazine ads. They can be used for broad branding, sponsorship, and advertorial opportunities. Because content sites provide huge reach, it becomes important for the ITC to take "ownership" of a particular content site for some time. This allows the chance to reach consumers in a variety of different ways, be it through a custom microsite, banner or button units, advertorial, lead generation, or a sweepstakes opportunity.



## INSPIRATION PROGRAMS

# WINTER

Promoting winter recreation continues to be a key marketing objective of the Idaho Travel Council. Winter travelers help even-out the demand for facilities and provide important revenues to travel service providers at a critical time of the year. Compared to our neighbor states, Idaho has some distinct competitive advantages: the quality of snow for Alpine and Nordic skiing is better, there are a variety of ski areas from locally owned to world-class resorts, and a good value for the travel dollar. Leisure travel in the winter is often recreation based and therefore has a more focused motivation: skiing, snowboarding, and snowmobiling.



**General Winter** – The objective of the general winter marketing program is to promote Idaho as a premier destination for winter travel. To accomplish this, the program will stimulate action by generating visits from non-residents in markets where travelers are concentrated and have transportation access to Idaho: Seattle, WA, Spokane, WA, Salt Lake City, UT, Missoula, MT, and Calgary, AB, Canada.

### Tactical elements include:

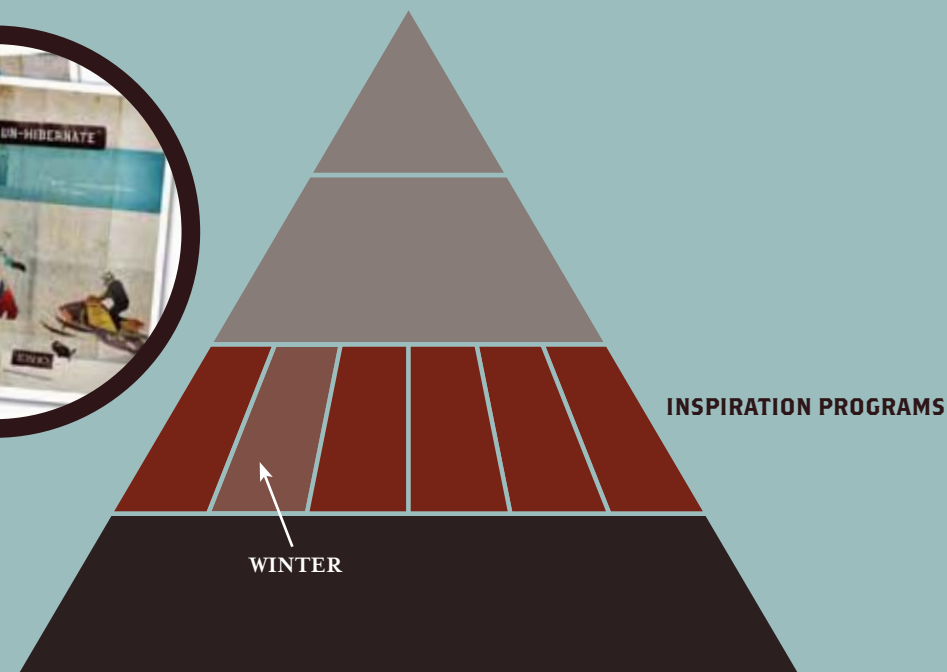
- Regional Newspaper Insert: Early season drop in key markets with content from several winter-themed travel destinations.
- Online: Search engine marketing, content sites, keyword optimization and new media opportunities, including social media geared to winter enthusiasts residing in key nearby markets.



- Print Campaign in Forbes Life, October issue.

**Snowmobiling** – The snowmobile marketing program is a success because of leveraging dollars. Both of its two elements are co-operatively based, maximizing exposure and messages using shared funds. The program is designed to raise awareness of Idaho and the Intermountain West as a premier snowmobiling destination. The effort is directed to markets in the upper Midwest and Pacific Northwest. Additional focus will be made to the Island Park area to counter the pending Yellowstone restrictions.

- Tri-State "Sled the Rockies" Co-op: Idaho's \$30,000 investment in this program gets a value of three times as much when matched with Wyoming and Montana's \$30,000 contributions. Co-op consists of an integrated campaign including online marketing, website development, and contest/incentive fulfillment.
- In-State Co-op: Comprised of co-op dollars from ITC grantees, this online lead generation program is designed to promote specific Idaho snowmobiling destinations. Those destinations receive qualified consumer leads for their own marketing/fulfillment.



## INSPIRATION PROGRAMS

# IN-STATE MARKETING

Promoting tourism to Idahoans is important as the state's population grows and in-state markets become more prominent. A reminder message to this influx of new Idahoans is to "play in their own backyard" and to "explore the state they call home."

The ITC's Spring Newspaper Insert serves as a tool for in-state marketing, in addition to reaching nearby markets. Comprised of Idaho travel content and advertising from all seven travel regions, the insert drops pre-Memorial Day as a summer travel planning piece.

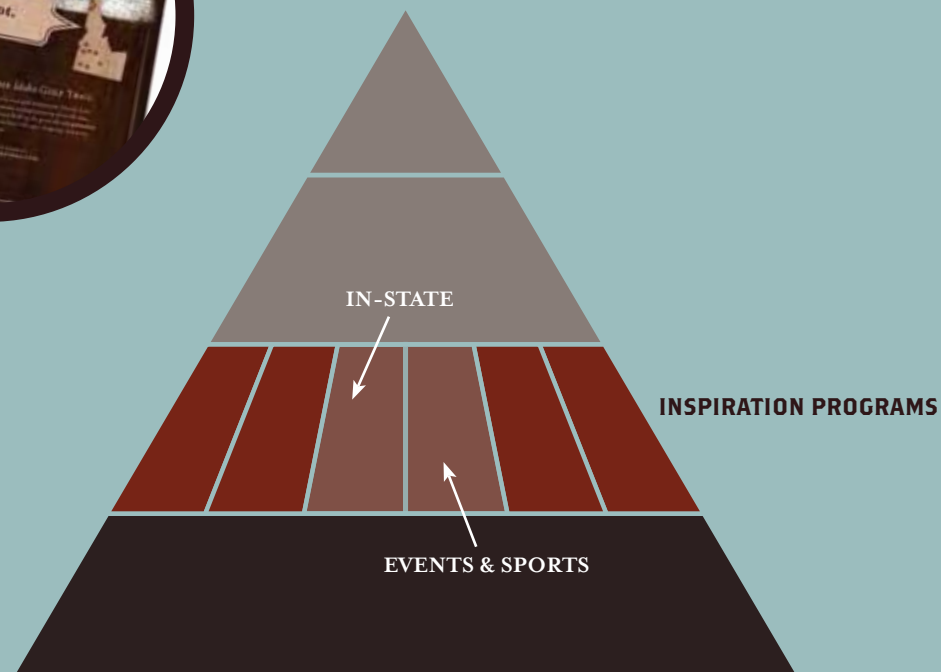
## INSPIRATION PROGRAMS

# SPECIAL EVENTS & SPORTS MARKETING

Hosting or sponsoring large-scale events can generate nationwide exposure for Idaho. It can also help lure future events that will make an economic impact to the state. The Division provides assistance to events that have a high probability of exposure for Idaho. It attends conferences and trade shows that focus on sporting events, disseminates potential event leads to local chambers and CVBs, and works with communities to attract and host events that are beneficial to their communities. Such benefits include generating local revenues and marketing programs including hospitality training.



- Roady's Humanitarian Bowl
- Albertsons Boise Open
- Ironman Coeur d'Alene
- 2009 Special Olympics Winter Games
- 2010 Winter Olympics Strategy
- Ironman 70.3-Boise
- 2009 Winter Games of Idaho



## INSPIRATION PROGRAMS

# CO-OPERATIVE MARKETING PROGRAMS

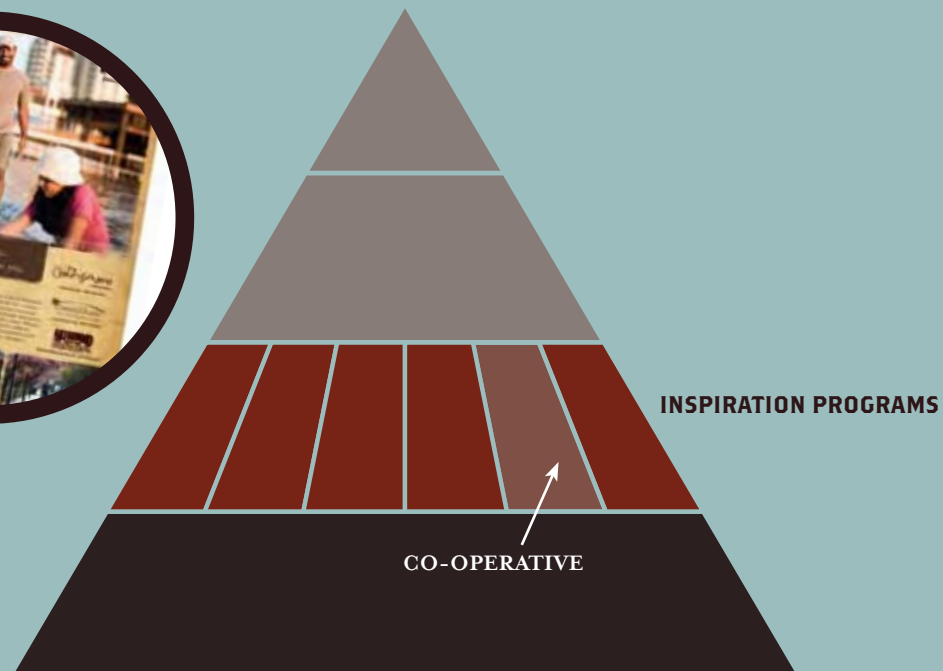


The task of building awareness of and travel to Idaho is a formidable one and the resources available are limited. Therefore, an integral component of the overall marketing strategy is to partner with entities that have similar need and market objectives. Partnering provides significant advantages beyond the obvious of budget efficiency.

- It gives the state message exposure in venues it would otherwise not.
- It enhances the state's overall brand by providing a more holistic view of Idaho's travel product.
- It provides a forum for other travel service providers in the state to build upon the state's campaign at a low cost.
- It provides a higher level of media impressions for the state's identity.
- It allows the state message to be blended with others for a more comprehensive view of this region of the country.



| Co-op Program                | Partners                                       | \$ (ITC)  | \$ (Partners)                            | \$Total   | Components  |
|------------------------------|--|---|--|-----------|---|
| Tri-State Snowmobile         | ID, MT, WY                                     | 30,000  | 60,000                                   | 90,000    | Internet & online advertisement campaign, sweepstakes contest                   |
| In-State Snowmobile          | Various chambers & travel organizations        | -   | 18,000*                                  | 18,000    | Online lead generation program  |
| Spring tabloid (May 2009)    | Idaho's travel industry                        | 91,000  | 91,000                                   | 182,000   | FSI insertion in all Idaho markets, plus Seattle, Spokane, and Salt Lake City   |
| Winter tabloid (Nov 2008)    | Idaho's winter industry                        | 80,000  | 80,000                                   | 160,000   | FSI insertion in Boise, Spokane, Seattle, Salt Lake City, Missoula, and Calgary |
| Idaho Travel Guide           | Various advertisers                            | 154,000   | 100,000                                  | 254,000   | 164 pg, 4-color guide (200,000 units)   |
| Prime Season Magazine Co-op  | Various public & private destinations in Idaho | 50,000  | 50,000                                   | 100,000   | Magazine advertising  |
| Rocky Mountain International | ID, MT, WY, SD                                 | 254,000   | 1,258,000                                | 1,512,000 | Foreign Offices, trade show participation, Film Tours                           |
|                              |  |  | Total: \$659,000 \$1,657,000 \$2,316,000 |           |   |





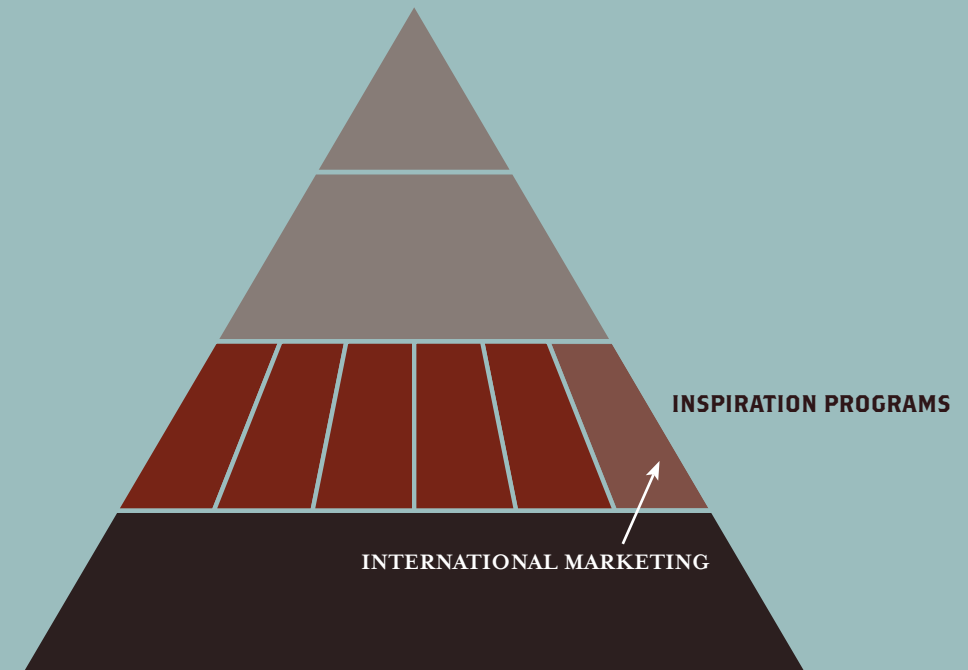
## INSPIRATION PROGRAMS

# INTERNATIONAL MARKETING

The state's International Marketing program seeks to expand the number and duration of international visitors to the state. The program works by cooperating and leveraging dollars with surrounding states in selling Idaho as part of the lure of the American West's culture and physical environment.

### Tactical Elements:

- Participation with three western states including Montana, Wyoming and South Dakota in Rocky Mountain International to promote Idaho to Europe and Scandinavia. Participation also includes national cities including Denver, Salt Lake City and Minneapolis.
- Work with existing Idaho trade offices, VisitUSA Committees, TIA (Travel Industry of America) and US Commercial Service offices to increase the number of international visitors to Idaho.
- Attend missions, trade shows and tours that focus upon international travelers, disseminating leads to Idaho suppliers.
- Host familiarization trips and marketplaces to promote Idaho first hand to tour operators and media, capable of bringing business to Idaho.
- Provide leadership and education to the private and public travel industry in Idaho about the value of developing international business.



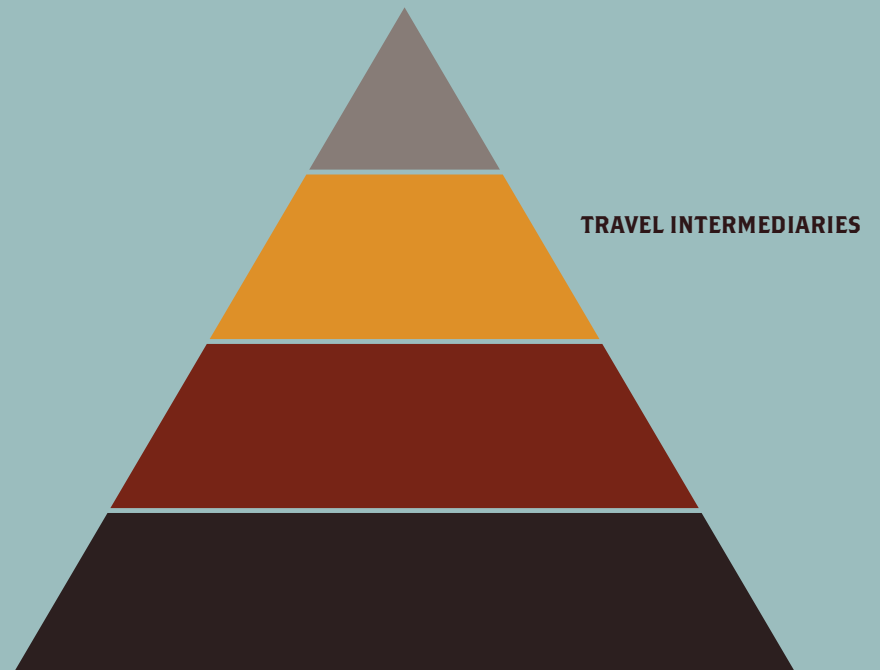
# TRAVEL INTERMEDIARIES

The travel intermediary market is a valuable segment for the continued growth of Idaho tourism and is served through the Division by providing information to third party gatekeepers who give recommendations, provide assistance, and book trips for consumers. These gatekeepers include:

- Travel Writers
- Group Tour Operators
- Meeting and Convention Planners
- Travel Agents

## **Tactical Elements:**

- Giving high priority to the regional grant program that addresses the travel intermediary market in an efficient manner.
- Providing leadership in organizing and managing statewide or regional efforts to stimulate awareness of Idaho directly to intermediaries.
  - Familiarization Trips
  - Media Tours
  - Media Blitz
  - Trade Shows
- Developing information about Idaho that will assist intermediaries in their recommendations.
  - Tour Idaho online group tour manual
  - Idaho meetings organization
- Maintaining an events database to assist Idaho's travel industry to travel intermediaries.



# IDAHO FILM OFFICE

The Idaho Film Office, as part of the Division of Tourism Development, is responsible for increasing the awareness of Idaho as a location for filming motion pictures as well as television, commercial, industrial, corporate, music video and interactive programming.

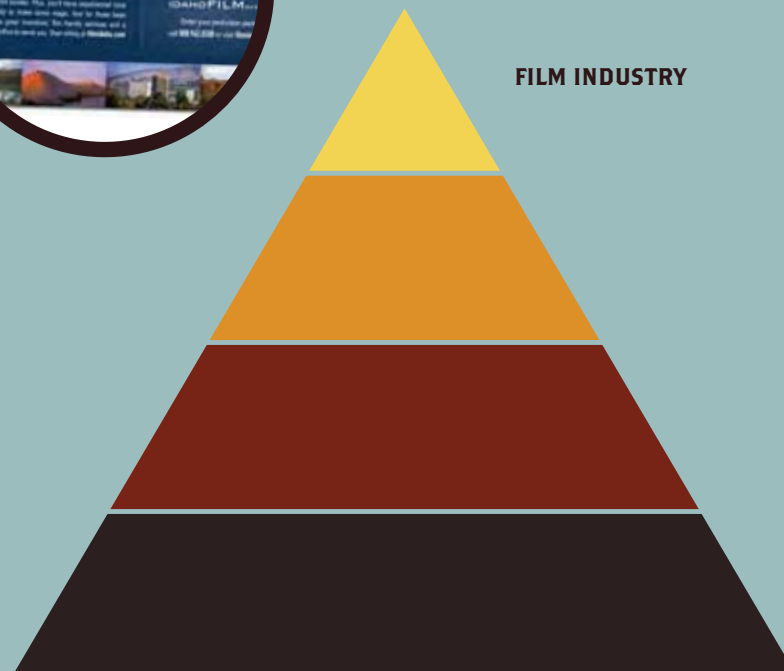
## GENERAL STRATEGIES

1. Build capacity and capability of the Idaho Film Office so it can respond effectively to calls from the film industry.
  - Idaho legislature and other public officials
  - Local Chambers of Commerce
  - Film industry suppliers in Idaho
  - Ancillary industries which may benefit from film activity
  - Governor's Project 60
3. Work with film industry and allied industry suppliers to continue to provide infrastructure support and production facilities for the film industry.
  - Workshops and Film Festivals
  - Work Force Development
4. Cooperate and partner with other organizations involved with economic development in Idaho so such groups see the film industry as an appropriate sector to solicit for business expansion.
  - Advertising campaign in national industry publications
  - Comprehensive film office website at [filmidaho.com](http://filmidaho.com)
5. Develop a 1:1 marketing effort to segments of the film industry where Idaho can effectively compete.
  - Independent films
  - Commercial production
6. Build awareness of Idaho as a progressive site location for any film production.



## TARGET AUDIENCES

1. Major studio features: Idaho's diverse scenery, locations and low cost of business can be attractive to major studio features.
2. Independent or small features: Independent filmmakers across the U.S. can also find Idaho's diverse scenery as a primary benefit, but can also be attracted more by the ease of permitting and overall lower cost of doing business in the state.
3. Commercial film production: The same benefits that make Idaho attractive to major studios and independent filmmakers also work for commercial production.
4. New media: Beyond features and commercials produced in Idaho, the state can benefit from attracting the industry to relocate to the state. Examples of companies are video game/software companies, special effects companies, post-production houses and studio production facilities (soundstages).



# { FY09 BUDGET SUMMARY



## I Year Round Program

|                                     |                  |
|-------------------------------------|------------------|
| Public/Industry Relations:          | \$111,000        |
| Education/Research:                 | \$72,500         |
| Year-round Promotions/Partnerships: | \$137,000        |
| <b>Total, Year-round:</b>           | <b>\$320,500</b> |

## II Information Delivery

|                                   |                  |
|-----------------------------------|------------------|
| Fulfillment:                      | \$310,000        |
| Websites:                         | \$100,000        |
| <b>Total, Program Operations:</b> | <b>\$410,000</b> |

## III Advertising & Promotion

|  |                    |
|--|--------------------|
| Print Program:                           | \$1,269,000        |
| Web Program:                             | \$541,000          |
| Winter Program:                          | \$220,000          |
| In-State Marketing Program:              | \$91,000           |
| International:                           | \$332,100          |
| Other Promotions:                        | \$116,500          |
| Other Publications:                      | \$45,000           |
| <b>Total, Advertising and Promotion:</b> | <b>\$2,614,600</b> |
| Contingency:                             | \$105,121          |



## TOTAL FY09

|                              |                    |
|------------------------------|--------------------|
| Idaho Travel Council budget: | <b>\$3,450,221</b> |
|------------------------------|--------------------|